

# Monthly Indicators

## May 2026

U.S. existing-home sales edged up 0.2% from the previous month to a seasonally adjusted annual rate of 4.02 million, according to the National Association of REALTORS® (NAR). Sales remained unchanged year-over-year. Regionally, existing-home sales rose in the Midwest and South, were flat in the Northeast, and declined in the West. Year-over-year, sales increased in the South, held steady in the West, and fell in the Northeast and Midwest.

Closed Sales increased 9.7 percent for Detached homes but decreased 22.8 percent for Attached homes. Pending Sales increased 16.5 percent for Detached homes but decreased 31.8 percent for Attached homes.

The Median Sales Price was down 9.5 percent to \$1,130,000 for Detached homes but increased 3.1 percent to \$767,500 for Attached homes. Days on Market remained flat for Detached homes but increased 20.0 percent for Attached homes. Supply decreased 32.6 percent for Detached homes and 28.6 percent for Attached homes.

National inventory climbed 5.8% month-over-month and 1.4% year-over-year, with approximately 1.47 million properties listed for sale heading into May, NAR reported. At the current sales pace, that represents a 4.4-month supply, reflecting a modest improvement in inventory conditions compared to a year earlier. Homes spent a median of 32 days on the market, down from 41 days the previous month, while the median existing-home price increased to \$417,700, up 0.9% from a year ago.

## Monthly Snapshot

**\$1,130,000**    **\$767,500**    **\$1,029,990**

Median Sales Price  
Detached Homes

Median Sales Price  
Attached Homes

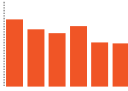

















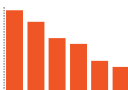







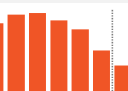



Median Sales Price  
All Properties Combined

A research tool provided by the North San Diego County REALTORS® for residential real estate activity in North San Diego County. Percent changes are calculated using rounded figures.

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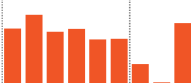


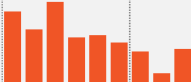


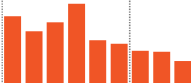





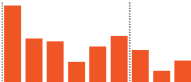





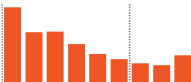





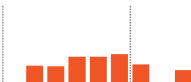


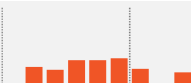

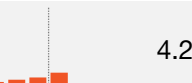
# Single-Family Detached Activity Overview

Key metrics by report month and for year-to-date (YTD) starting from the first of the year. **Detached homes only.**

Key Metrics	Historical Sparkbars			5-2025	5-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
	05-2024	05-2025	05-2026						
New Listings				1,160	<b>1,016</b>	- 12.4%	5,265	<b>5,240</b>	- 0.5%
Pending Sales				654	<b>762</b>	+ 16.5%	3,073	<b>3,464</b>	+ 12.7%
Closed Sales				672	<b>737</b>	+ 9.7%	2,890	<b>3,121</b>	+ 8.0%
Days on Market				25	<b>25</b>	0.0%	31	<b>33</b>	+ 6.5%
Median Sales Price				\$1,248,997	<b>\$1,130,000</b>	- 9.5%	\$1,180,000	<b>\$1,150,000</b>	- 2.5%
Average Sales Price				\$1,582,775	<b>\$1,446,010</b>	- 8.6%	\$1,563,165	<b>\$1,515,733</b>	- 3.0%
Pct. of Orig. Price Received				98.1%	<b>98.4%</b>	+ 0.3%	98.0%	<b>98.0%</b>	0.0%
Housing Affordability Index				22	<b>25</b>	+ 13.6%	23	<b>24</b>	+ 4.3%
Inventory of Homes for Sale				2,531	<b>1,851</b>	- 26.9%	--	<b>--</b>	--
Months Supply of Inventory				4.3	<b>2.9</b>	- 32.6%	--	<b>--</b>	--

# Single-Family Attached Activity Overview

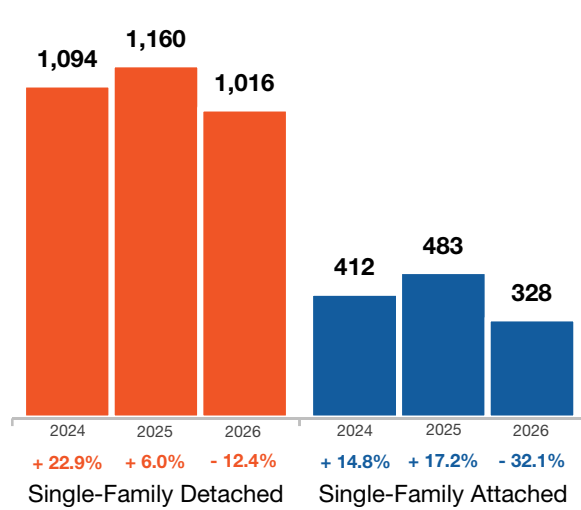
Key metrics by report month and for year-to-date (YTD) starting from the first of the year. **Attached homes only.**

Key Metrics	Historical Sparkbars			5-2025	5-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
	05-2024	05-2025	05-2026						
New Listings				483	<b>328</b>	- 32.1%	2,310	<b>1,780</b>	- 22.9%
Pending Sales				274	<b>187</b>	- 31.8%	1,299	<b>1,133</b>	- 12.8%
Closed Sales				267	<b>206</b>	- 22.8%	1,232	<b>1,054</b>	- 14.4%
Days on Market				30	<b>36</b>	+ 20.0%	33	<b>36</b>	+ 9.1%
Median Sales Price				\$744,500	<b>\$767,500</b>	+ 3.1%	\$730,000	<b>\$755,000</b>	+ 3.4%
Average Sales Price				\$883,688	<b>\$914,317</b>	+ 3.5%	\$853,379	<b>\$885,314</b>	+ 3.7%
Pct. of Orig. Price Received				98.0%	<b>98.1%</b>	+ 0.1%	98.2%	<b>97.8%</b>	- 0.4%
Housing Affordability Index				36	<b>36</b>	0.0%	37	<b>37</b>	0.0%
Inventory of Homes for Sale				1,055	<b>703</b>	- 33.4%	--	<b>--</b>	--
Months Supply of Inventory				4.2	<b>3.0</b>	- 28.6%	--	<b>--</b>	--

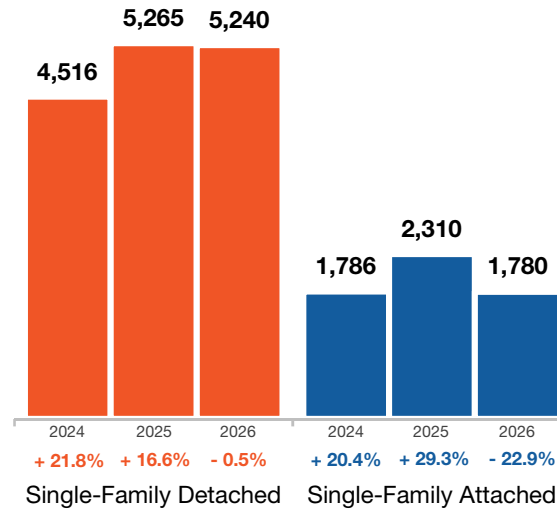
# New Listings

A count of the properties that have been newly listed on the market in a given month.

## May

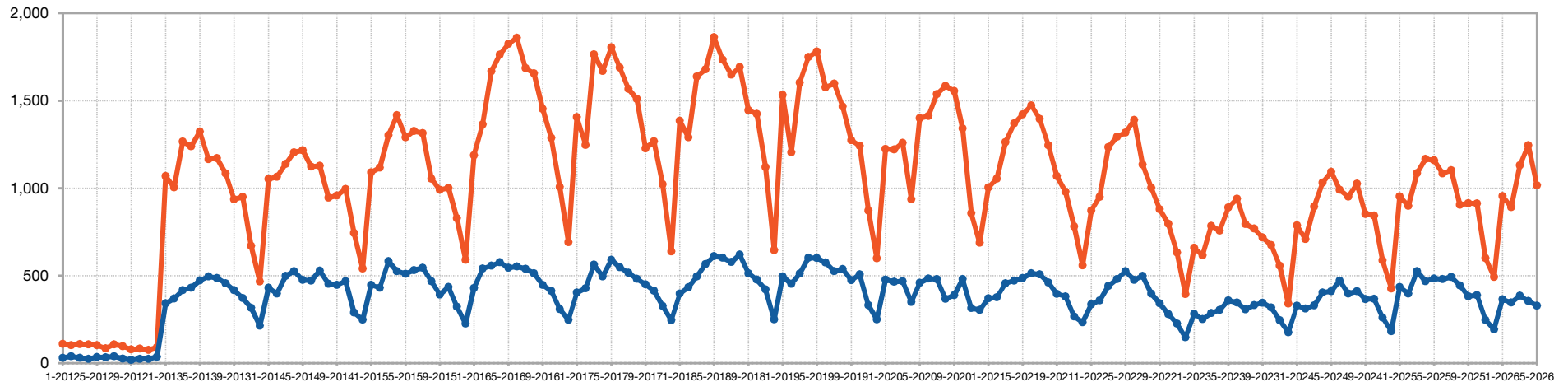


## Year to Date



New Listings	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Jun-2025	1,084	+9.4%	480	+1.9%
Jul-2025	1,102	+15.8%	493	+23.9%
Aug-2025	905	-11.8%	444	+8.0%
Sep-2025	914	+7.2%	383	+4.6%
Oct-2025	912	+8.1%	389	+5.7%
Nov-2025	601	+2.4%	247	-5.0%
Dec-2025	492	+15.5%	193	+6.0%
Jan-2026	955	+0.2%	365	-16.1%
Feb-2026	892	-0.8%	346	-12.8%
Mar-2026	1,131	+4.1%	385	-26.8%
Apr-2026	1,246	+6.8%	356	-24.1%
<b>May-2026</b>	<b>1,016</b>	<b>-12.4%</b>	<b>328</b>	<b>-32.1%</b>
12-Month Avg	938	+2.8%	367	-7.5%

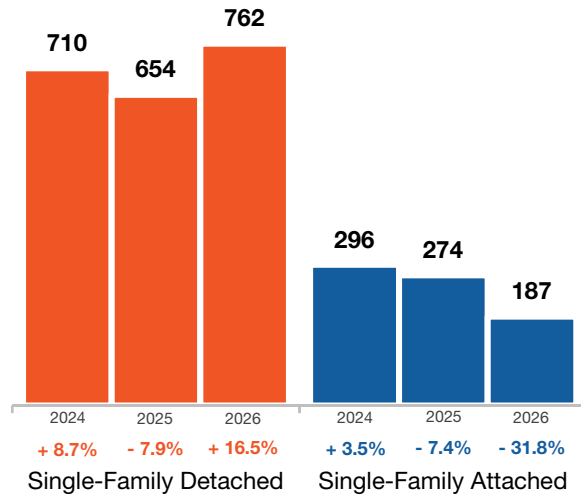
## Historical New Listings by Month



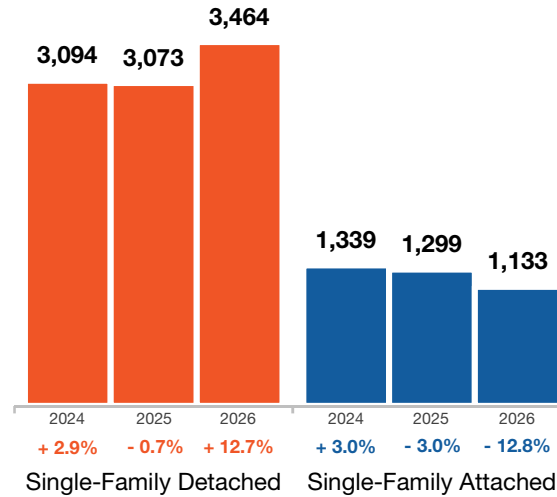
# Pending Sales

A count of the properties on which offers have been accepted in a given month.

## May

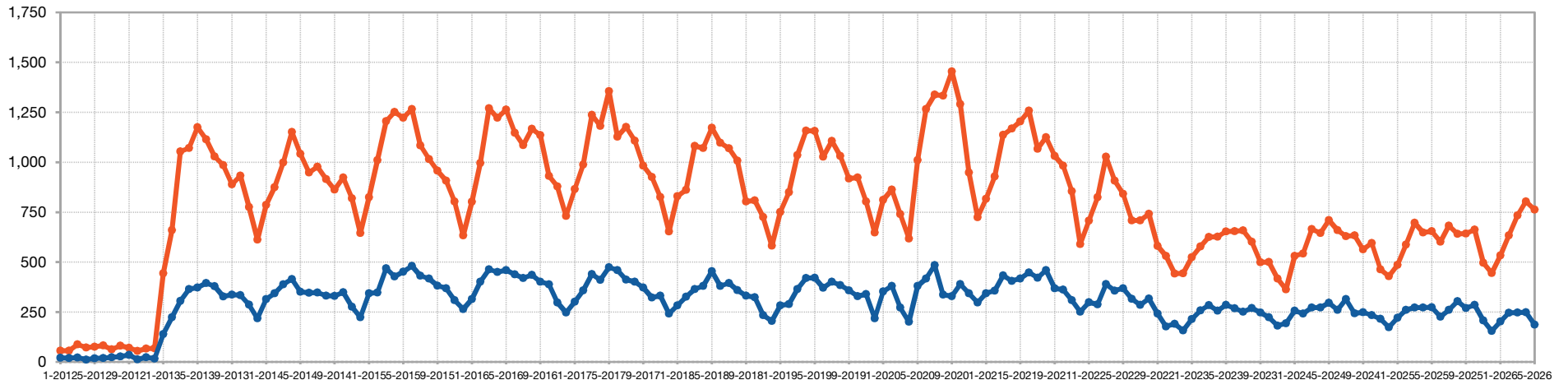


## Year to Date



Pending Sales	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Jun-2025	602	-8.8%	226	-13.1%
Jul-2025	682	+8.3%	260	-17.5%
Aug-2025	641	+1.1%	304	+24.6%
Sep-2025	643	+14.2%	270	+8.4%
Oct-2025	663	+11.4%	285	+21.8%
Nov-2025	497	+7.1%	208	-3.7%
Dec-2025	445	+3.7%	155	-10.4%
Jan-2026	533	+9.7%	203	-8.1%
Feb-2026	633	+7.7%	246	-5.4%
Mar-2026	733	+5.2%	248	-8.8%
Apr-2026	803	+23.9%	249	-8.5%
<b>May-2026</b>	<b>762</b>	<b>+16.5%</b>	<b>187</b>	<b>-31.8%</b>
12-Month Avg	587	+8.4%	249	-5.0%

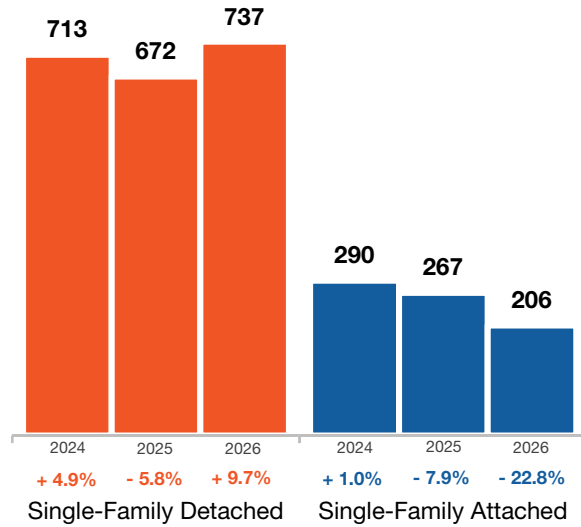
## Historical Pending Sales by Month



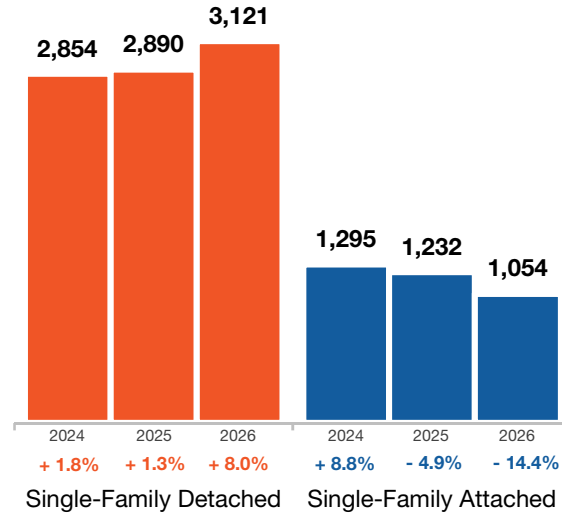
# Closed Sales

A count of the actual sales that closed in a given month.

## May

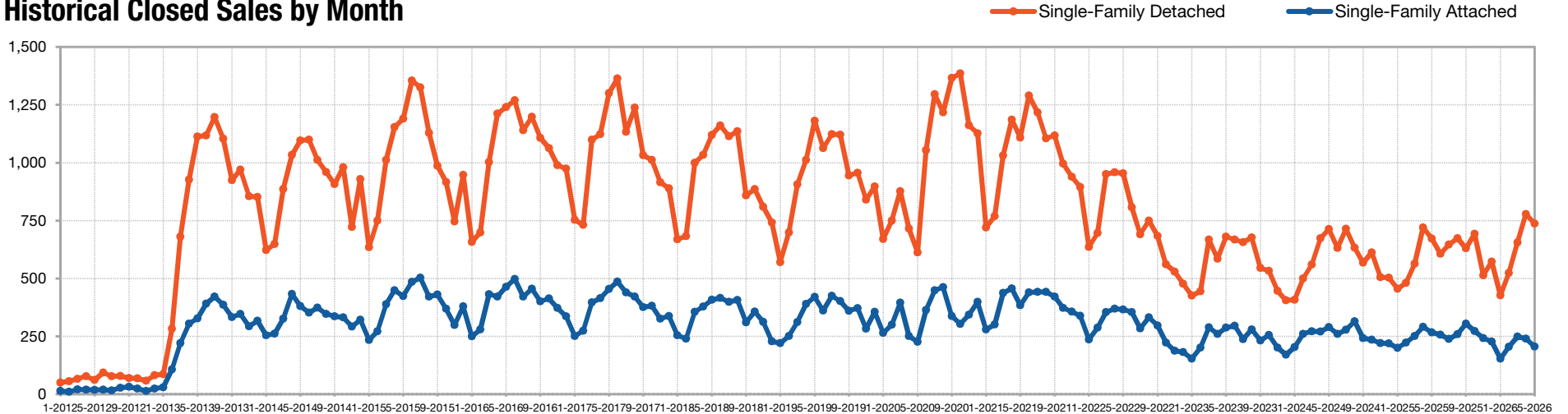


## Year to Date



Closed Sales	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Jun-2025	607	-3.8%	257	-1.2%
Jul-2025	646	-9.5%	239	-14.0%
Aug-2025	673	+6.3%	259	-17.8%
Sep-2025	630	+10.9%	305	+26.0%
Oct-2025	693	+13.2%	273	+16.2%
Nov-2025	513	+1.4%	242	+9.5%
Dec-2025	573	+13.9%	227	+3.7%
Jan-2026	427	-6.2%	154	-23.0%
Feb-2026	524	+9.2%	205	-8.1%
Mar-2026	655	+16.3%	249	-0.8%
Apr-2026	778	+8.1%	240	-17.5%
<b>May-2026</b>	<b>737</b>	<b>+9.7%</b>	<b>206</b>	<b>-22.8%</b>
12-Month Avg	588	+5.7%	250	-4.9%

## Historical Closed Sales by Month

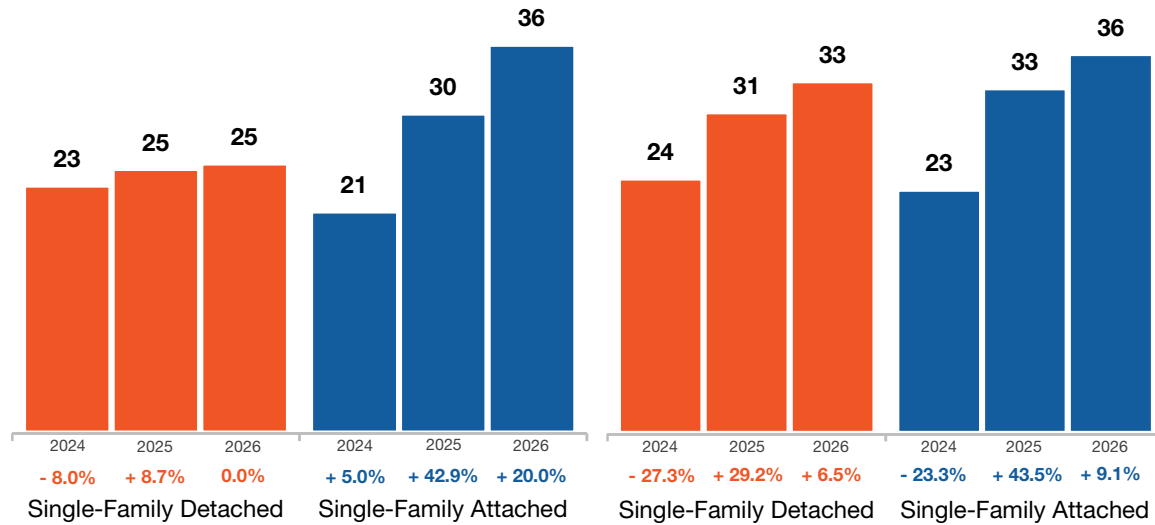


# Days on Market Until Sale

Average number of days between when a property is listed and when an offer is accepted in a given month.

## May

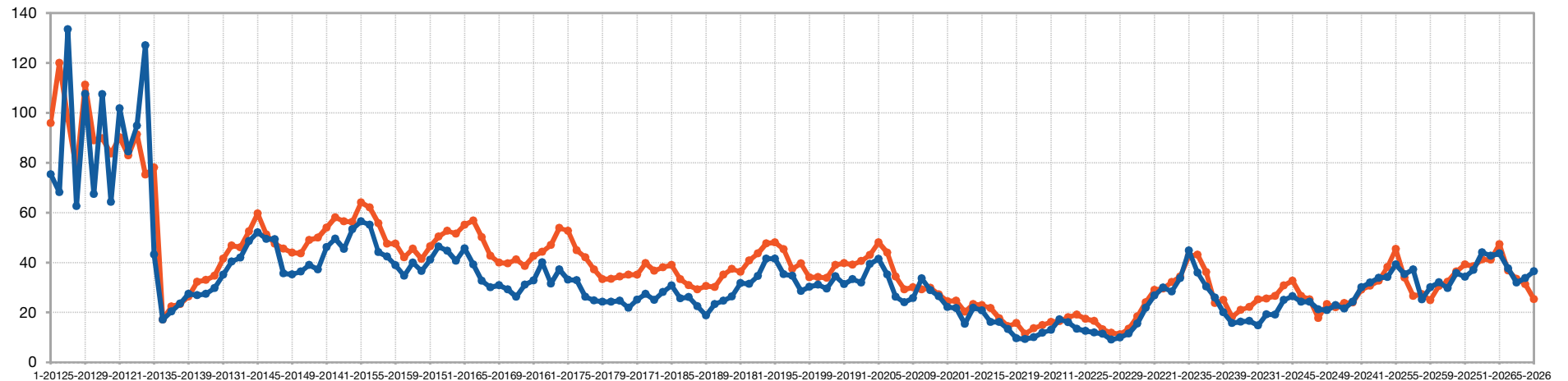
## Year to Date



Days on Market	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Jun-2025	31	+40.9%	32	+39.1%
Jul-2025	32	+33.3%	30	+36.4%
Aug-2025	36	+50.0%	36	+50.0%
Sep-2025	39	+34.5%	34	+13.3%
Oct-2025	38	+22.6%	37	+15.6%
Nov-2025	41	+24.2%	44	+29.4%
Dec-2025	41	+7.9%	43	+26.5%
Jan-2026	47	+4.4%	44	+12.8%
Feb-2026	37	+8.8%	38	+8.6%
Mar-2026	33	+22.2%	32	-13.5%
Apr-2026	31	+14.8%	34	+36.0%
<b>May-2026</b>	<b>25</b>	<b>0.0%</b>	<b>36</b>	<b>+20.0%</b>
12-Month Avg*	29	+21.9%	30	+21.2%

\* Days on Market for all properties from June 2025 through May 2026. This is not the average of the individual figures above.

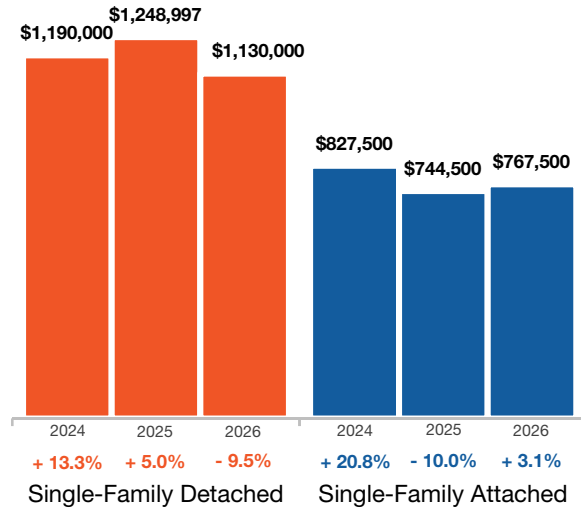
## Historical Days on Market Until Sale by Month



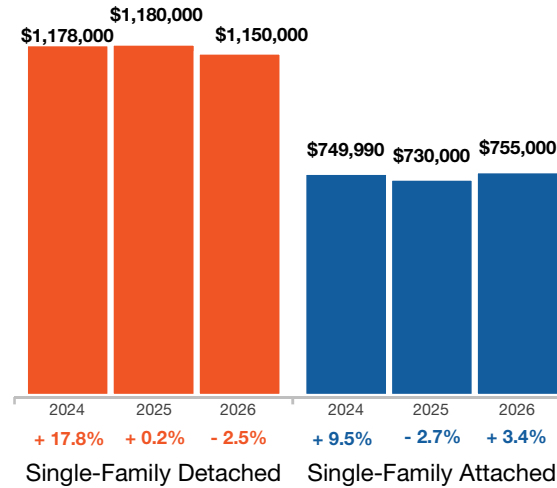
# Median Sales Price

Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.

## May



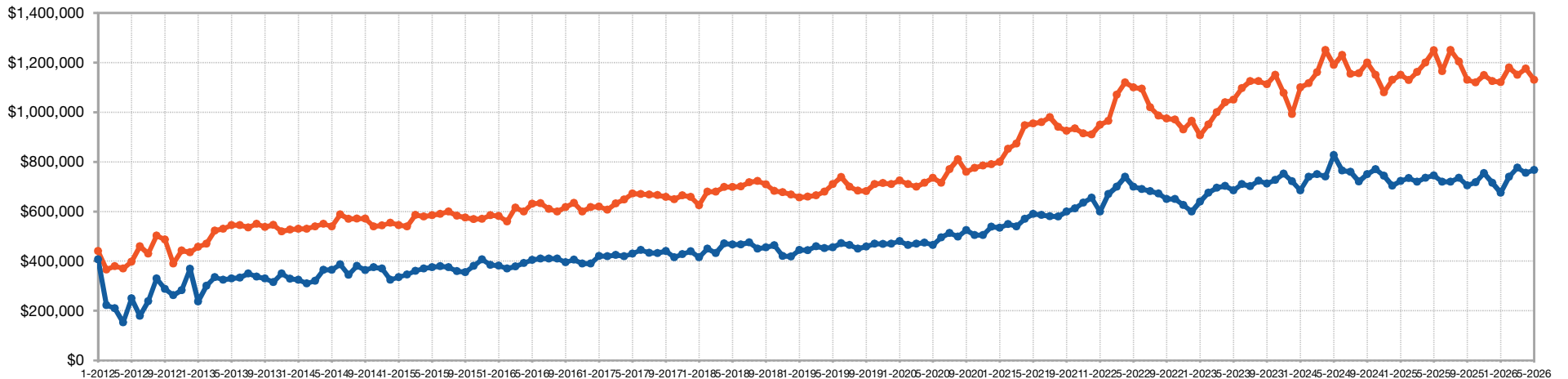
## Year to Date



Median Sales Price	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Jun-2025	\$1,165,000	-5.3%	\$719,900	-5.9%
Jul-2025	\$1,250,000	+8.2%	\$720,000	-5.2%
Aug-2025	\$1,203,750	+4.1%	\$735,000	+1.9%
Sep-2025	\$1,130,000	-5.8%	\$705,000	-6.0%
Oct-2025	\$1,120,000	-2.6%	\$717,500	-6.8%
Nov-2025	\$1,149,500	+6.4%	\$754,800	+1.5%
Dec-2025	\$1,125,000	-0.5%	\$715,000	+1.6%
Jan-2026	\$1,121,200	-2.5%	\$675,500	-6.6%
Feb-2026	\$1,180,000	+4.5%	\$740,000	+0.8%
Mar-2026	\$1,150,000	-1.0%	\$777,000	+7.9%
Apr-2026	\$1,175,500	-2.0%	\$755,000	+2.7%
<b>May-2026</b>	<b>\$1,130,000</b>	<b>-9.5%</b>	<b>\$767,500</b>	<b>+3.1%</b>
12-Month Avg*	\$1,168,000	-0.9%	\$740,000	-1.4%

\* Median Sales Price for all properties from June 2025 through May 2026. This is not the average of the individual figures above.

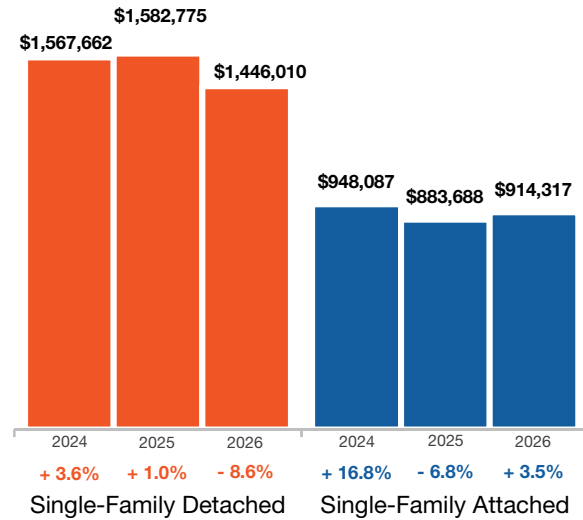
## Historical Median Sales Price by Month



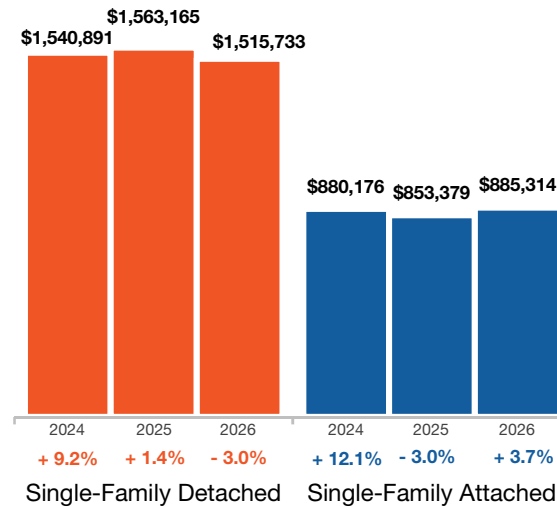
# Average Sales Price

Average sales price for all closed sales, not accounting for seller concessions, in a given month.

## May



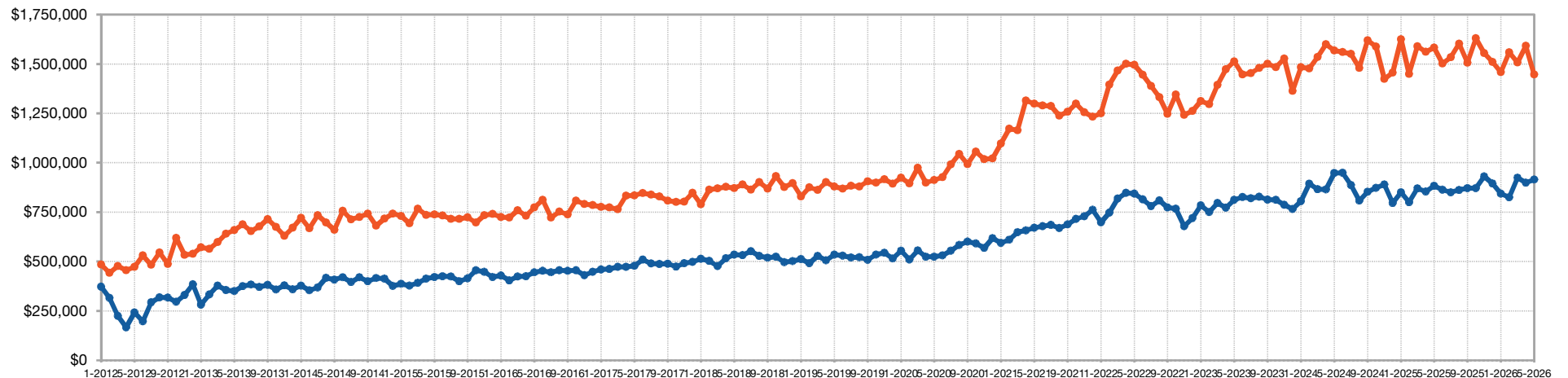
## Year to Date



Avg. Sales Price	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Jun-2025	\$1,501,559	-3.7%	\$863,892	-8.9%
Jul-2025	\$1,534,131	-1.0%	\$849,544	-4.2%
Aug-2025	\$1,601,739	+8.2%	\$862,274	+6.8%
Sep-2025	\$1,506,543	-7.0%	\$871,211	+2.2%
Oct-2025	\$1,629,771	+2.6%	\$871,814	-0.1%
Nov-2025	\$1,554,803	+9.2%	\$930,984	+4.6%
Dec-2025	\$1,510,435	+3.8%	\$894,977	+12.4%
Jan-2026	\$1,458,505	-10.2%	\$843,603	-0.7%
Feb-2026	\$1,558,619	+7.5%	\$825,344	+3.2%
Mar-2026	\$1,507,785	-5.1%	\$923,969	+6.1%
Apr-2026	\$1,591,238	+1.9%	\$898,356	+5.1%
<b>May-2026</b>	<b>\$1,446,010</b>	<b>-8.6%</b>	<b>\$914,317</b>	<b>+3.5%</b>
12-Month Avg*	\$1,533,428	-0.5%	\$879,191	+2.4%

\* Avg. Sales Price for all properties from June 2025 through May 2026. This is not the average of the individual figures above.

## Historical Average Sales Price by Month

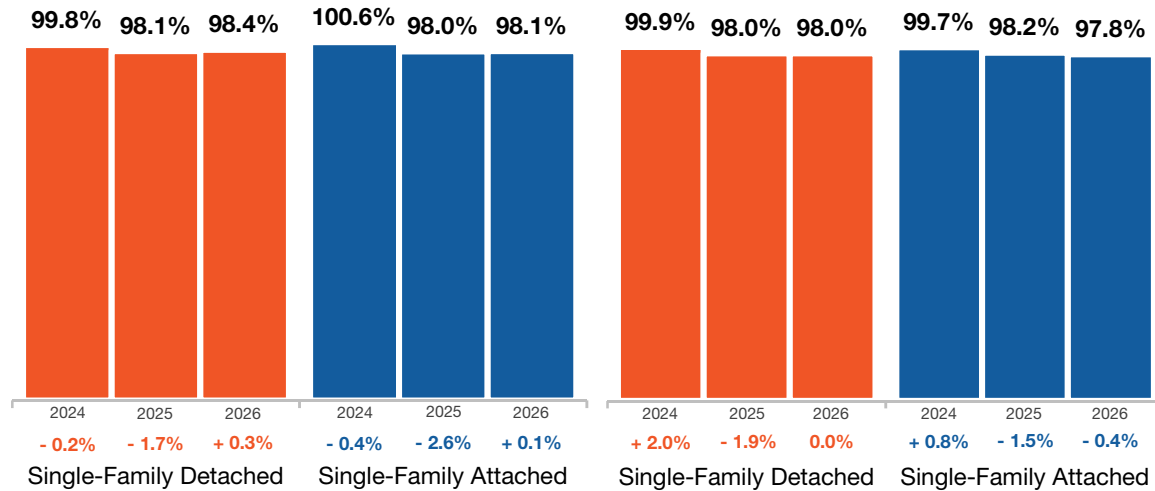


# Percent of Original List Price Received

Percentage found when dividing a property's sales price by its original list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.

## May

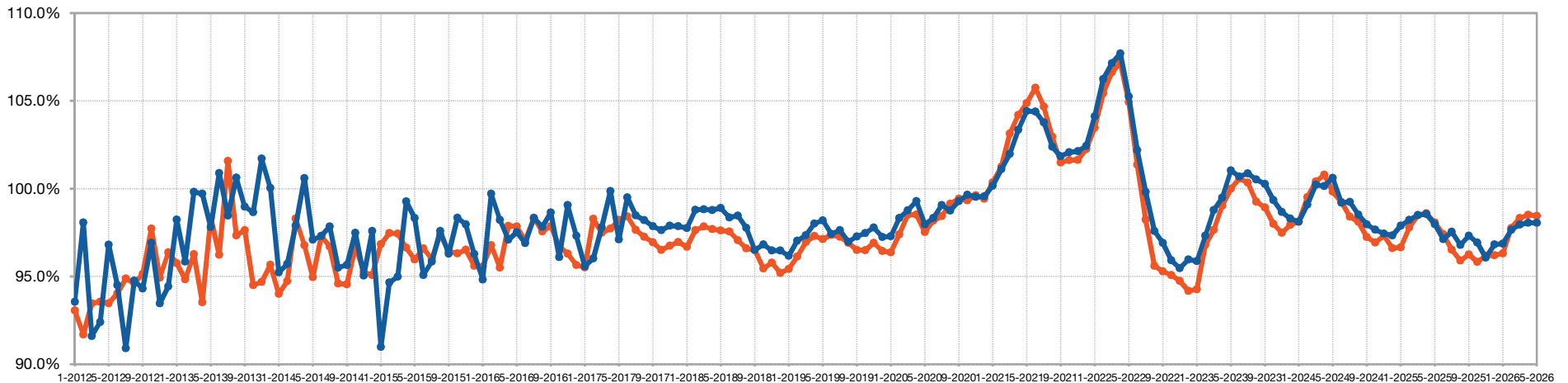
## Year to Date



Pct. of Orig. Price Received	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Jun-2025	97.4%	-1.8%	97.1%	-2.1%
Jul-2025	96.5%	-1.9%	97.5%	-1.7%
Aug-2025	95.9%	-2.2%	96.8%	-1.7%
Sep-2025	96.2%	-1.0%	97.3%	-0.7%
Oct-2025	95.8%	-1.1%	96.9%	-0.8%
Nov-2025	96.2%	-1.1%	96.1%	-1.3%
Dec-2025	96.2%	-0.4%	96.8%	-0.5%
Jan-2026	96.3%	-0.4%	96.9%	-1.0%
Feb-2026	97.8%	0.0%	97.6%	-0.6%
Mar-2026	98.3%	-0.2%	97.9%	-0.6%
Apr-2026	98.5%	-0.1%	98.1%	-0.4%
<b>May-2026</b>	<b>98.4%</b>	<b>+0.3%</b>	<b>98.1%</b>	<b>+0.1%</b>
12-Month Avg*	97.0%	-0.9%	97.3%	-1.0%

\* Pct. of Orig. Price Received for all properties from June 2025 through May 2026. This is not the average of the individual figures above.

## Historical Percent of Original List Price Received by Month

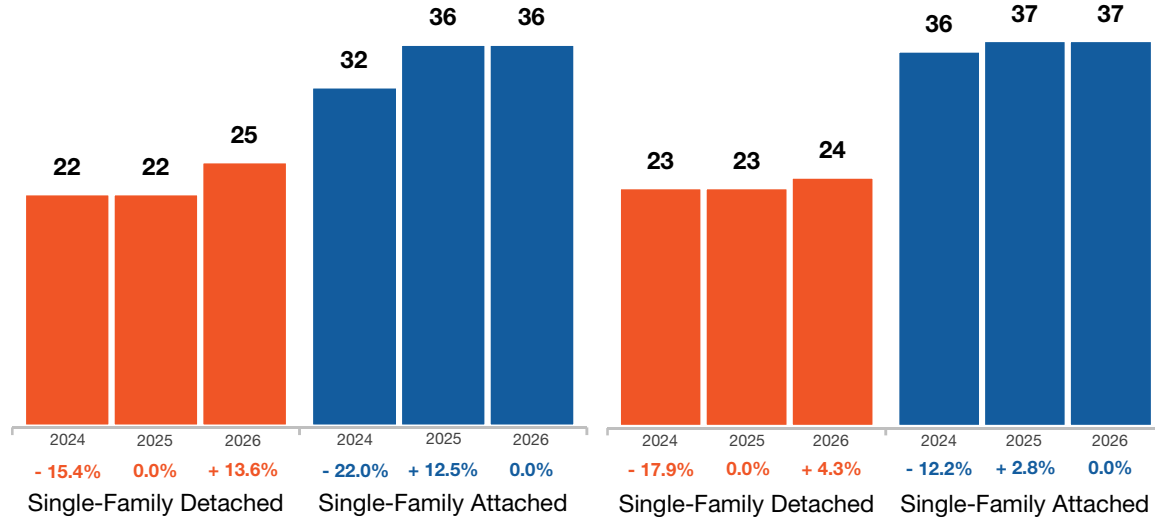


# Housing Affordability Index

This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.

## May

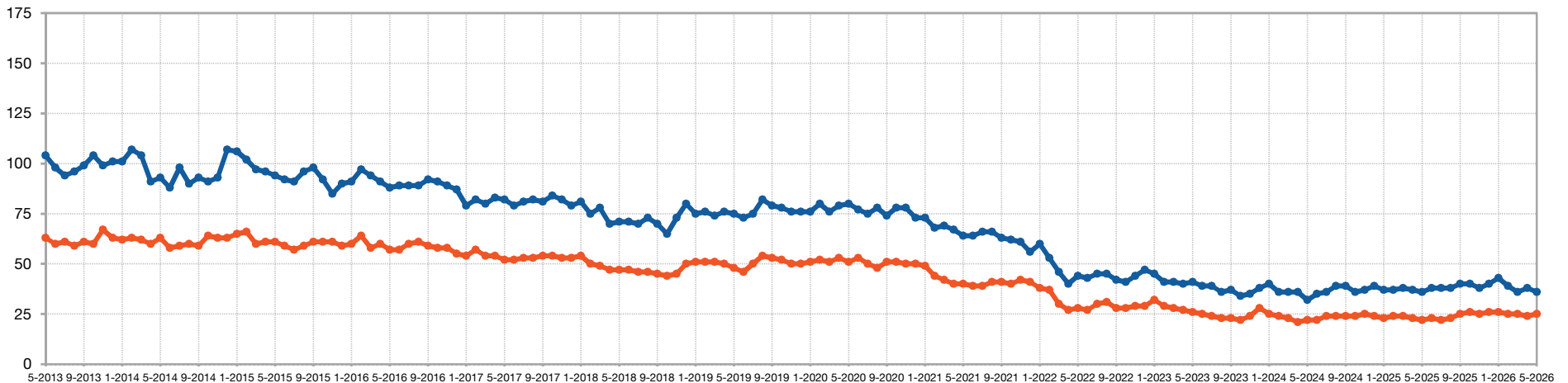
## Year to Date



Affordability Index	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Jun-2025	23	+4.5%	38	+8.6%
Jul-2025	22	-8.3%	38	+5.6%
Aug-2025	23	-4.2%	38	-2.6%
Sep-2025	25	+4.2%	40	+2.6%
Oct-2025	26	+8.3%	40	+11.1%
Nov-2025	25	0.0%	38	+2.7%
Dec-2025	26	+8.3%	40	+2.6%
Jan-2026	26	+13.0%	43	+16.2%
Feb-2026	25	+4.2%	39	+5.4%
Mar-2026	25	+4.2%	36	-5.3%
Apr-2026	24	+4.3%	38	+2.7%
<b>May-2026</b>	<b>25</b>	<b>+13.6%</b>	<b>36</b>	<b>0.0%</b>
12-Month Avg*	25	+5.4%	39	+3.4%

\* Affordability Index for all properties from June 2025 through May 2026. This is not the average of the individual figures above.

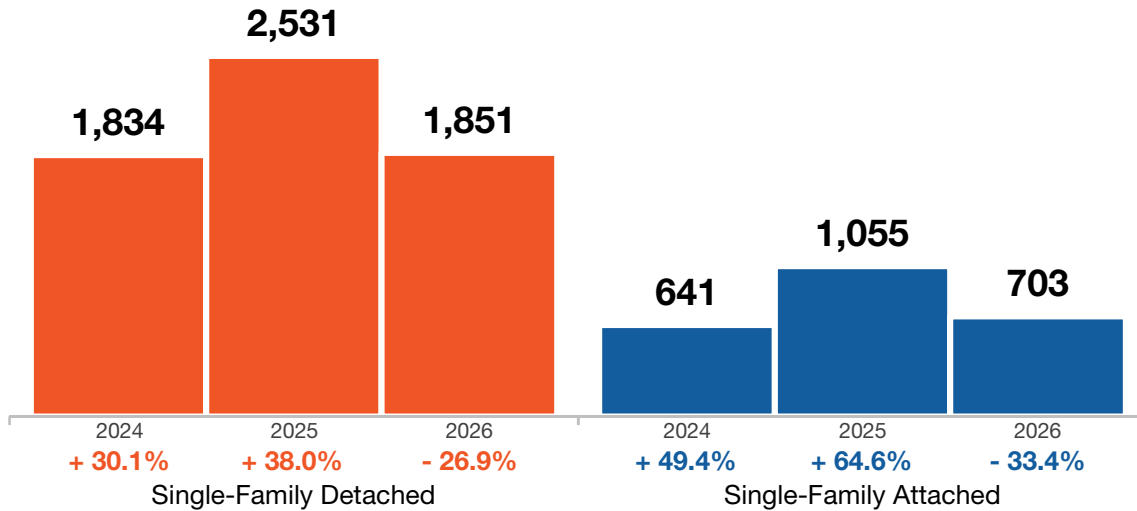
## Historical Housing Affordability Index by Month



# Inventory of Homes for Sale

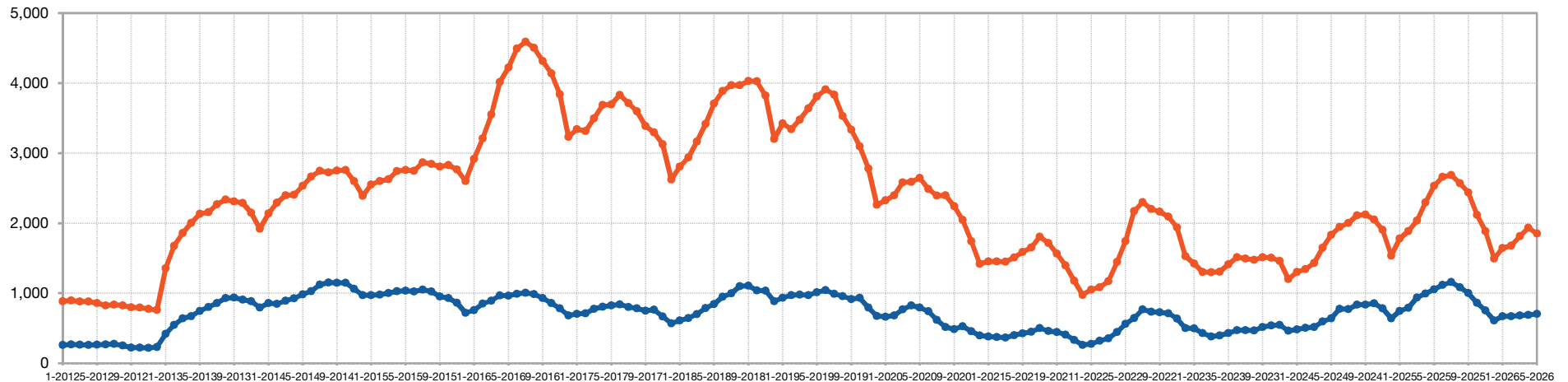
The number of properties available for sale in active status at the end of a given month.

May



Homes for Sale	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Jun-2025	2,661	+36.7%	1,118	+44.1%
Jul-2025	2,687	+34.3%	1,158	+50.2%
Aug-2025	2,572	+21.8%	1,083	+29.7%
Sep-2025	2,439	+14.8%	1,000	+19.6%
Oct-2025	2,117	+3.2%	862	+1.1%
Nov-2025	1,886	-0.9%	752	-4.0%
Dec-2025	1,494	-2.7%	612	-4.5%
Jan-2026	1,645	-7.5%	669	-10.1%
Feb-2026	1,680	-10.9%	669	-15.5%
Mar-2026	1,814	-10.9%	680	-27.4%
Apr-2026	1,934	-15.7%	690	-30.7%
<b>May-2026</b>	<b>1,851</b>	<b>-26.9%</b>	<b>703</b>	<b>-33.4%</b>
12-Month Avg	2,017	+2.4%	835	-0.2%

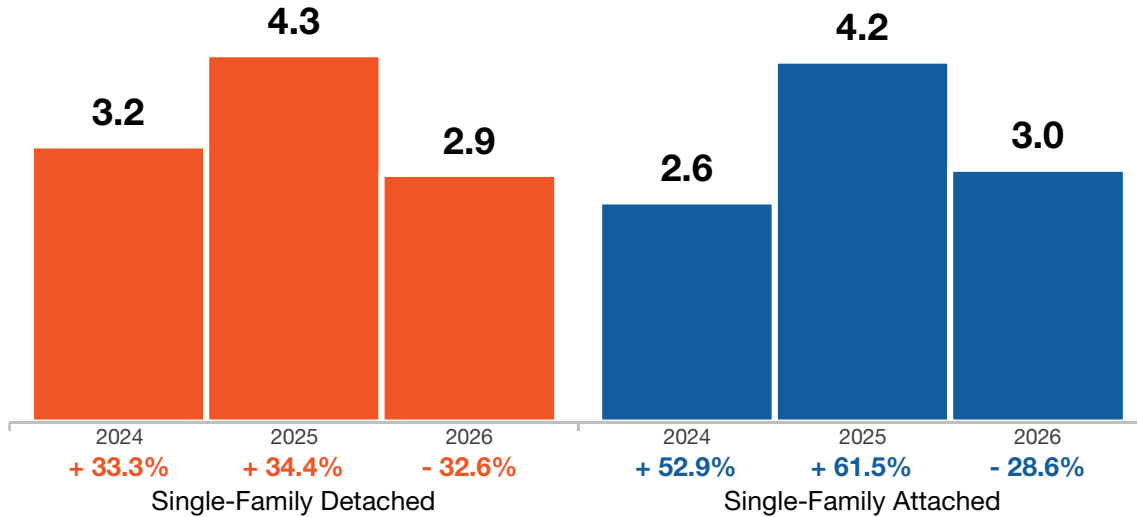
## Historical Inventory of Homes for Sale by Month



# Months Supply of Inventory

The inventory of homes for sale at the end of a given month, divided by the average monthly pending sales from the last 12 months.

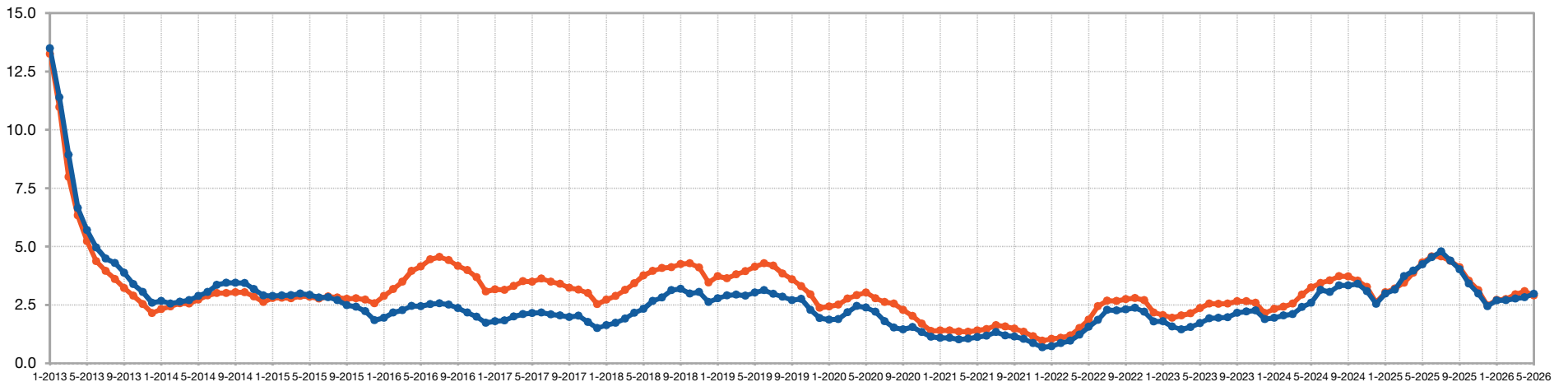
## May



Months Supply	Single-Family Detached	Year-Over-Year Change	Single-Family Attached	Year-Over-Year Change
Jun-2025	4.6	+35.3%	4.5	+45.2%
Jul-2025	4.6	+31.4%	4.8	+54.8%
Aug-2025	4.4	+18.9%	4.4	+33.3%
Sep-2025	4.1	+10.8%	4.0	+21.2%
Oct-2025	3.5	0.0%	3.4	0.0%
Nov-2025	3.1	-6.1%	3.0	-3.2%
Dec-2025	2.5	-3.8%	2.4	-4.0%
Jan-2026	2.7	-10.0%	2.7	-10.0%
Feb-2026	2.7	-15.6%	2.7	-15.6%
Mar-2026	3.0	-11.8%	2.8	-24.3%
Apr-2026	3.1	-20.5%	2.8	-30.0%
<b>May-2026</b>	<b>2.9</b>	<b>-32.6%</b>	<b>3.0</b>	<b>-28.6%</b>
12-Month Avg*	3.5	-1.3%	3.3	+1.5%

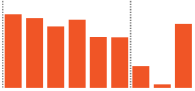
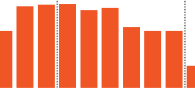
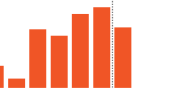
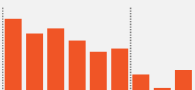
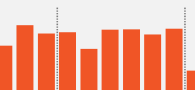
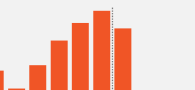







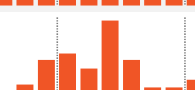














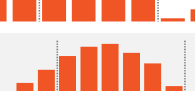

\* Months Supply for all properties from June 2025 through May 2026. This is not the average of the individual figures above.

## Historical Months Supply of Inventory by Month



# All Properties Combined

Key metrics by report month and for year-to-date (YTD) starting from the first of the year.

Key Metrics	Historical Sparkbars			5-2025	5-2026	Percent Change	YTD 2025	YTD 2026	Percent Change
	05-2024	05-2025	05-2026						
New Listings				1,645	<b>1,345</b>	- 18.2%	7,587	<b>7,021</b>	- 7.5%
Pending Sales				928	<b>949</b>	+ 2.3%	4,376	<b>4,597</b>	+ 5.1%
Closed Sales				939	<b>943</b>	+ 0.4%	4,130	<b>4,176</b>	+ 1.1%
Days on Market				26	<b>28</b>	+ 7.7%	31	<b>34</b>	+ 9.7%
Median Sales Price				\$1,037,000	<b>\$1,029,990</b>	- 0.7%	\$1,000,000	<b>\$1,015,000</b>	+ 1.5%
Average Sales Price				\$1,384,526	<b>\$1,329,861</b>	- 3.9%	\$1,350,475	<b>\$1,356,403</b>	+ 0.4%
Pct. of Orig. Price Received				98.0%	<b>98.4%</b>	+ 0.4%	98.1%	<b>98.0%</b>	- 0.1%
Housing Affordability Index				26	<b>27</b>	+ 3.8%	27	<b>27</b>	0.0%
Inventory of Homes for Sale				3,641	<b>2,557</b>	- 29.8%	--	<b>--</b>	--
Months Supply of Inventory				4.3	<b>2.9</b>	- 32.6%	--	<b>--</b>	--